How to use filters in the PPM Tool

What is a filter?

A filter is used in the PPM tool to limit the projects that are viewed. You may want to do this if you have a large portfolio of projects. A good example is you may want to only view or report on “active” projects.

Who can create a filter?

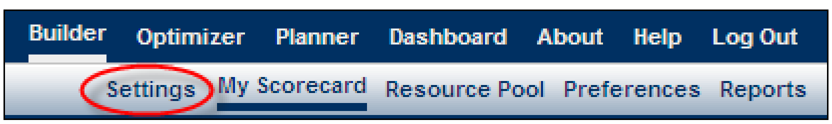
Any PPM tool user.

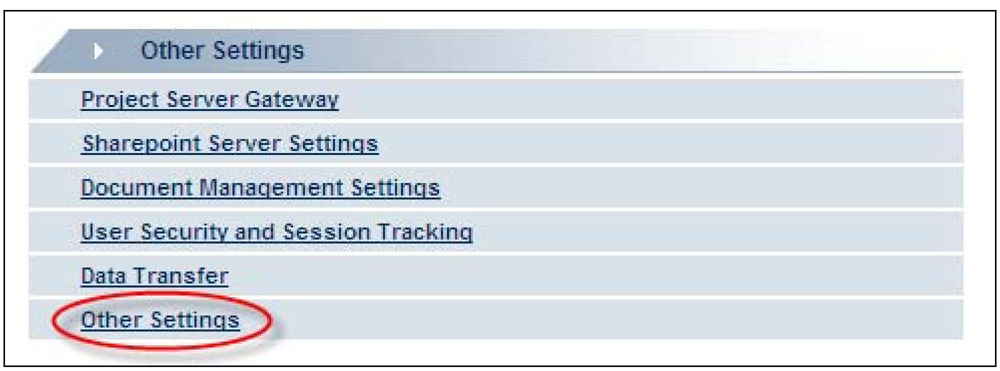
Where can I use a filter?

A filter can be used on the Builder, My Scorecard, or Dashboard view to limit the projects you view to those in the filter list. A report filter allows you to use portfolio report data only on the projects in the filter.

How do I create a filter?

To create a filter in the PPM tool, begin by clicking on “Settings” at the top of the screen, then scroll down to the bottom of the configuration settings screen and choose “Other Settings”. From there, choose “Filter Management” on the right hand column and choose the “Add Filter” tab.





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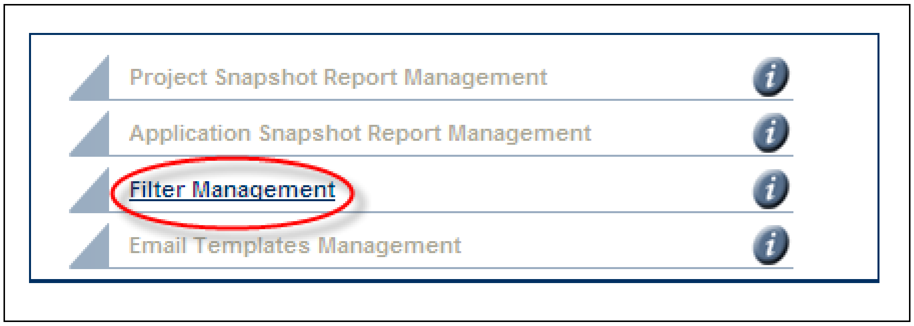
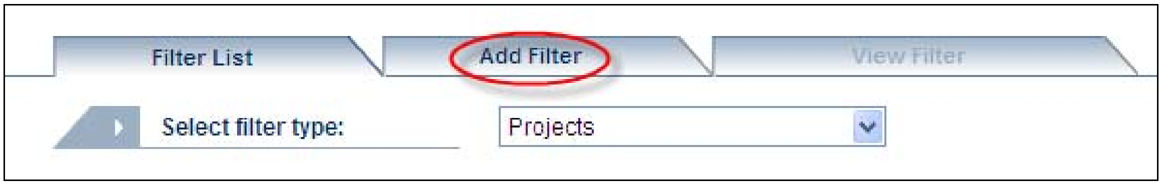
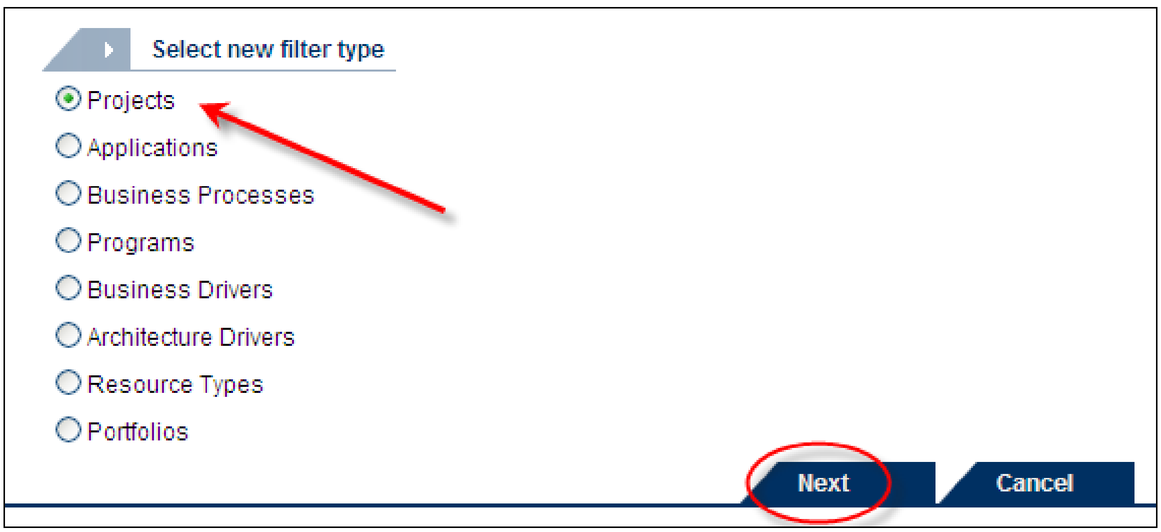
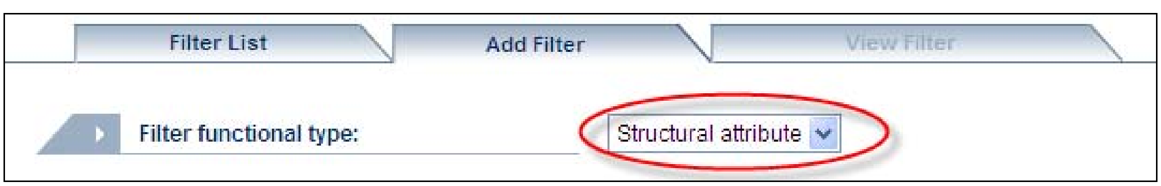




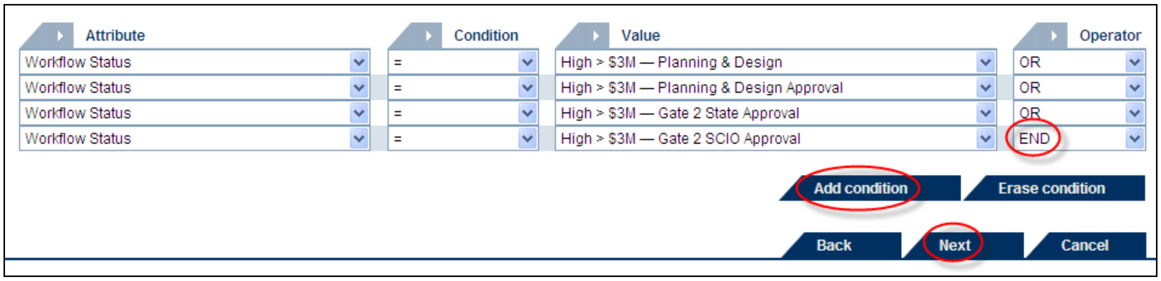
The “Projects” option should already be selected as the default filter type, so click on “Next”.



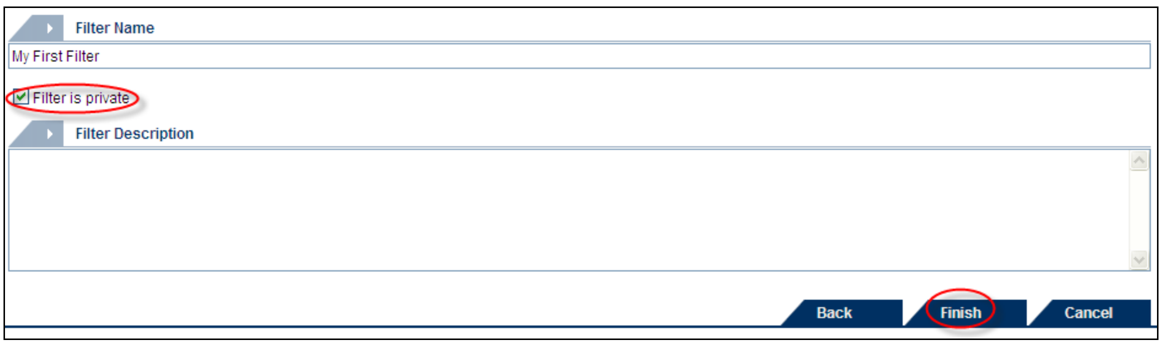
Click the dropdown on “Filter functional type” and change it from “Projects” to “Structural attribute.”



At this point, you can determine which attributes to create a filter on. One of the most common filters is to choose the “Workflow Status” attribute and pick the values for workflow status that you want included in your filter. You can add multiple attributes (or more commonly, multiple values for the same attribute) on this page by clicking on "Add condition" as often as you need. Typically you would leave the "or" operator between these conditions, with an "end" operator after the final condition.



Once you have added your conditions, click "Next", give your filter a name and click "Finish". In general, please leave your filters as "private" (the default) – otherwise all users will see your filter in their list and anyone can delete or modify your filter (but please don't do this to other users).



Note: If you want to hand-select particular projects rather than ones that meet a certain attribute values, you can leave the "Filter functional type" as "Projects" and manually select the projects to include in your filter.

How do I use a filter?

Now that you have created your filter, the next step is to use it. From the Builder/My Scorecard screen or the Dashboard screen, click the small dropdown arrow to the far right of the "Portfolio Selector" line ( ), then click the dropdown under "Filter". You should see a list of all the filters you have created as well as any public filters created by other users. Choose the filter you just created and click on "Apply" button next to the "Group by Hierarchy". This will limit the list of projects to those that conform to the filter conditions. (NOTE: if you click the "Apply" next to the "Filter" dropdown, the "Group by Hierarchy" value defaults to "None").

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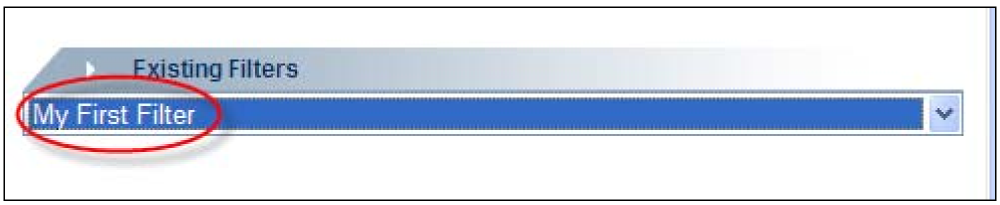
Another use for filters is to limit the projects included in a "Project List/Grouping" portfolio report. In this case, when you are creating or editing a portfolio report, click on the dropdown under "Existing Filters", and you can choose the filter you just created. This will limit the number of projects in your report to those that meet the filter conditions. For more information on how to create a portfolio report, please see "**Instructions for creating a basic portfolio report in the PPM Tool**".



How do I share a filter?

Once you create a private filter, it is possible to share it with someone else. To do this, you edit the filter again and uncheck the "Filter is private" checkbox and update the filter. This will make the filter public and available to all users. Have the person you want to share the filter with log on, edit the same filter, re-check the "Filter is private" checkbox and update the filter. This will save it as private for both of you. Please keep in mind that if either of you modify or delete the filter, the change will apply to both users.